CITY OF SAN DIEGO

ORGANIZATION LOBBYIST QUARTERLY DISCLOSURE REPORT

[Form EC-804]

INTRODUCTION

The Quarterly Disclosure Report is used to disclose an organization lobbyist's lobbying activities during the reporting period, its activity expenses, and the campaign contributions, campaign fundraising activities, campaign-related services, and City contracts associated with the owners, compensated officers, or lobbyists in the organization. An "organization lobbyist" is any business or organization, including a non-profit entity, that has reached the "10 lobbying contacts in 60 days" threshold under the City's Lobbying Ordinance. Refer to the Ethics Commission's fact sheet "Am I a Lobbyist?" for more information concerning this threshold.

File one Quarterly Disclosure Report to cover the activities of the entire organization. Note that this is a departure from the City's previous reporting procedures. Under the current procedures, individual lobbyists do not file disclosure statements. All information relevant to the individual lobbyists should be contained within the organization's report.

The reporting period is one of the following calendar quarters: January through March; April through June; July through September; and October through December. The report must be filed no later than the end of the month following the quarter. For example, the deadline for the April-June quarterly report is the last day of July.

The Quarterly Disclosure Report form is available from the City Clerk. Electronic versions are available on the City Clerk's website: www.sandiego.gov/city-clerk/elections/lobby/index.shtml

You may type or print on the form. If printing, use blue or black ink. If using the electronic version of the form, note that you can type on the form with your computer, but you cannot save the information you enter unless you have the full version of Adobe Acrobat.

When you file the Quarterly Disclosure Report, include only the cover sheet and the schedules that contain the organization's disclosures. Do not file the instruction sheets or any schedules on which the organization has nothing to report.

File the original completed and signed form with the City Clerk.

COMPLETING THE FORM

Cover Sheet

- Identify the reporting period in the upper left-hand portion of the form. Example:

Period Covered:
From 1/1/08
To 3/31/08

- If the report is an amendment, check the applicable box. You are required to file an amendment when information on a previously filed report is incorrect or missing. You must amend your Quarterly Disclosure Report within ten calendar days of discovering incomplete or inaccurate information on the report.
- If you are terminating your organization's status as an "organization lobbyist," check the applicable box. A termination statement may be filed when the organization no longer engages in lobbying activities. Be sure to report all activity since the organization's last Quarterly Disclosure Report.
- Identify the name, address, and telephone number of the organization.
- Check one or more boxes to indicate which schedules are <u>not</u> included in your report. Do not attach schedules for which your organization has nothing to report. For more information, see the instructions for each schedule, which are located immediately preceding the applicable schedule.
- After completing the report, identify the total number of pages you are submitting. Count the cover sheet and all of the attached schedules. Do not count (and do not file) any of the instruction sheets or any schedules that are blank.
- A duly authorized owner or officer of the organization must complete the bottom of the cover sheet to verify the accuracy of the information disclosed on the report.

Period Covered:
From ___________
To _____________

CITY OF SAN DIEGO

ORGANIZATION LOBBYIST QUARTERLY DISCLOSURE REPORT

[Form EC-804]

For Official Use Only

Type or Print in Ink. File Original with the City Clerk.

☐ Check Box if an Amendment

☐ Check Box if Terminating Status as an Organization Lobbyist

Total Number of Pages: ______

Identify the Name of the Organization.

Name of Organization	Telephone Number

Business Address	(Number & Street)	(City)	(State)	(Zip)

Schedule A: City Decisions. Complete this schedule by describing each decision the organization sought to influence during the reporting period. If the organization did not engage in any lobbying during the quarter, check this box: ☐

Schedule B: Activity Expenses. Complete this schedule by describing all activity expenses made during the reporting period. If it did not make any activity expenses during this period, check this box: ☐

Schedule C: Candidate Contributions. Complete this schedule by describing all contributions of $100 or more made by any owners, compensated officers, and lobbyists of the organization during the reporting period to a candidate for City elective office. If no such contributions were made, check this box: ☐

Schedule D: Ballot Measure Contributions. Complete this schedule by describing all contributions of $100 or more made by any owners, compensated officers, and lobbyists of the organization during the reporting period to a City ballot measure committee controlled by a City candidate or officeholder. If no such contributions were made, check this box: ☐

Schedule E: Fundraising Activities. Complete this schedule by describing all fundraising activities by owners, compensated officers, and lobbyists of the organization in the amount of $1,000 or more during the reporting period. If no such fundraising activity took place, check this box: ☐

Schedule F: Campaign Services. Complete this schedule by describing all compensated campaign-related services personally provided by owners, compensated officers, and lobbyists of the organization during the reporting period. If no such services were rendered, check this box: ☐

Schedule G: City Contract Services. Complete this schedule by describing all compensated services personally provided by owners, compensated officers, and lobbyists of the organization under a City contract during the reporting period. If no such services were rendered, check this box: ☐

VERIFICATION

I have been authorized by the Organization Lobbyist identified above to make this verification. I have exercised reasonable diligence in the course of reviewing this Quarterly Disclosure Report for completeness and accuracy. I declare under penalty of perjury under the laws of the State of California that the contents of this Quarterly Disclosure Report, including all attached schedules, are true, correct, and complete, except as to those matters which are stated on information and belief, and as to those matters I believe them to be true.

Executed on ________________________ at ____
(Date) (City and State)

By: ______________________________ ______________________________ ______________________
(Signature) (Print Name) (Title)

Instructions for Schedule A: City Decisions

Complete this schedule if your organization lobbied any City Officials during the reporting period. Your organization is "lobbying" when one of its owners, officers, or employees has a direct communication (e.g., meeting, telephone call, letter, or e-mail) with a City Official for the purpose of influencing a municipal decision on behalf of the organization. "Lobbying activities" also include monitoring municipal decisions, preparing testimony and presentations, conducting research, performing investigations, gathering facts, attending hearings, communicating with clients, and waiting to meet with officials, to the extent that such activities are related to influencing a municipal decision.

Completing the Form:

- Identify the organization's name at the top of each schedule.
- Fill out at a schedule for each municipal decision for which the organization lobbied the City during the reporting period.
- Each Client Disclosure schedule sheet contains space for reporting information regarding two municipal decisions. Attach as many continuation sheets as are necessary to report all the municipal decisions the organization sought to influence during the reporting period.
- Identify the specific municipal decision (e.g., land development permit for Parcel XYZ, banning alcohol on beaches).
- Identify the outcome sought by the organization (e.g., approve the permit, adopt the ban).
- Identify the names and departments of each City Official lobbied (see list below).
  - ✓ Do not include the names of City Officials whom you addressed only at public meetings held in accordance with the Brown Act. Do not include the names of City employees who are not "City Officials."
  - ✓ Note that some City Officials use a working title that is different from their official title. Check the Ethics Commission website for a list of unclassified City Officials and their official titles.
- Identify the names of each individual in the organization who lobbied City Officials with regard to this decision during the reporting period
- State the total number of lobbying "contacts" the organization made during the reporting period. For example, if the organization's employees had four private meetings with a City Official concerning the amendment of land use permit, and sent that official two letters on the matter, report six contacts. See the Ethics Commission's fact sheet "Am I a Lobbyist?" for more information concerning the "contacts" rules.
- Do not include decisions for which the organization solely engaged in "indirect" lobbying efforts, such as public relations and advertising. If the organization spent $5,000 or more in a calendar quarter for such efforts, it is also an "Expenditure Lobbyist," and should report those payments on an Expenditure Lobbyist Quarterly Disclosure Report. See the Expenditure Lobbyist disclosure forms and fact sheets for more information.
- Check the box at the bottom of the page if you have additional information to report (i.e., more municipal decisions the organization sought to influence), and disclose that information on a continuation sheet (i.e., another copy of the "City Decisions" schedule). Identify the organization's name at the top of each continuation sheet.

Note: "City Officials" are limited to the following positions of the City and the City's agencies: elected officeholder; Council staff member; Council Committee Consultant; Council Representative; Assistant City Attorney; Deputy City Attorney; General Counsel; Chief; Assistant Chief; Deputy Chief; Assistant Deputy Chief; City Manager; Assistant City Manager; Deputy City Manager; Management Assistant to City Manager Treasurer; Auditor and Comptroller; Independent Budget Analyst; Budget/Legislative Analyst; Financial Operations Manager; City Clerk; Labor Relations Manager; Retirement Administrator; Director; Assistant Director; Deputy Director; Assistant Deputy Director; Chief Executive Officer; Chief Operating Officer; Chief Financial Officer; President; and Vice-President. "City Officials" also include any member of a City board, commission, or committee who is required to file a Statement of Economic Interests.

SCHEDULE A: CITY DECISIONS

Name of Organization: ____

Fill out a separate entry for EACH municipal decision for which the organization lobbied the City of San Diego during the reporting period.

SPECIFIC MUNICIPAL DECISION: ____

A. Outcome sought: ____

B. Name and department of each City Official lobbied:

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

C. Name of each individual in the organization who lobbied City Officials with regard to this municipal decision:

____________________ ____________________

____________________ ____________________

D. Total number of lobbying “contacts” made by the organization during the period concerning this decision: ____

SPECIFIC MUNICIPAL DECISION: ____

A. Outcome sought: ____

B. Name and department of each City Official lobbied:

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

Name: ____________________ Department: ____________________

C. Name of each individual in the organization who lobbied City Officials with regard to this municipal decision:

____________________ ____________________

____________________ ____________________

D. Total number of lobbying “contacts” made by the organization during the period concerning this decision: ____

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule B: Activity Expenses

Complete and attach this schedule only if the organization made activity expenses during the reporting period. If no activity expenses were made, check the applicable box on the cover sheet, and do not attach Schedule B.

An "activity expense" means any payment made to, or on behalf of, any City Official or any member of a City Official's immediate family, by a lobbyist, lobbying firm, or organization lobbyist. Activity expenses include gifts, meals, consulting fees, salaries, and any other form of compensation to a City Official or a City Official's immediate family, but do not include campaign contributions. For example, a $3,000 consulting fee paid to a Department Director's spouse would be considered a reportable activity expense.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Identify each activity expense made during the reporting period that exceeds $10 on any single occasion.
- For each activity expense identified, be sure to disclose:
  - ✓ the date of the expense;
  - ✓ a description of the expense (e.g., "consulting fees paid to John Smith");
  - ✓ the name, title, and department of the City Official who benefited (or whose immediate family benefited) from the activity expense;
  - ✓ the name of each lobbyist in the organization who participated in making the activity expense;
  - ✓ the name and address of the payee of the activity expense; and,
  - ✓ the amount of the expense.
- Attach as many continuation sheets as are necessary to report all the activity expenses the organization made during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

➡ ***Note:*** City law limits gifts (e.g., meals, tickets to events) from an organization lobbyist and its lobbyists to $10 per City Official within a calendar month. This means that if a lobbyist in your organization purchases an $8 lunch for a particular City Official, neither the organization nor any of its lobbyists may purchase a $3 beverage for that official in the same calendar month. Because the Activity Expenses schedule only requires the reporting of activity expenses that exceed $10, your organization should have no gifts to report.

➡ ***Note:*** Tickets and invitations to events held for non-profit entities (e.g., the Chamber of Commerce, Father Joe's Villages) are not considered gifts for purposes of the Lobbying Ordinance. Accordingly, they are not subject to the $10 limit and need not be reported on the Quarterly Report Form. Note, however, that such tickets and invitations may be considered gifts under the City's Ethics Ordinance and could subject to the recipient to that Ordinance's gift limits, reporting requirements, and disqualification rules.

SCHEDULE B: ACTIVITY EXPENSES

Name of Organization: ____

Fill out a separate entry for EACH activity expense of more than $10 made by the organization or its lobbyists to benefit a City Official, or his or her immediate family, during the reporting period.

Date of activity expense: _________________________ Amount of activity expense: $____________________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

_____________________________ ____________________________ ____________________________

Name and address of the payee of the activity expense: ____

____

Date of activity expense: _________________________ Amount of activity expense: $____________________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

_____________________________ ____________________________ ____________________________

Name and address of the payee of the activity expense: ____

____

Date of activity expense: _________________________ Amount of activity expense: $____________________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

_____________________________ ____________________________ ____________________________

Name and address of the payee of the activity expense: ____

____

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule C: Campaign Disclosures – City Candidates

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists made contributions of $100 or more during the reporting period to a candidate for City office. Note that elected City Officials (the Mayor, City Councilmembers, and the City Attorney) are considered "candidates" under campaign laws for as long as they remain in office, and are also "candidates" for purposes of this schedule. If no such contributions were made, check the applicable box on the cover sheet, and do not attach Schedule C.

Completing the form:

- Identify the organization's name at the top of each schedule.
- For each contribution of $100 or more made by an owner, compensated officer, or lobbyist of the organization during the reporting period, state:
  - ✓ the applicable name of the owner, compensated officer, or lobbyist;
  - ✓ the name of the candidate supported;
  - ✓ the date of the contribution; and
  - ✓ the amount of the contribution.
- Attach as many continuation sheets as are necessary to report all contributions made by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Jane is an organization lobbyist's President. In October, she writes a personal check for $250 and gives it to a candidate seeking office in an upcoming City election. When the organization prepares its October-December disclosure report, it must identify the $250 contribution, including Jane's name, the date and amount of the contribution, and the name of the candidate.

For example: After Councilmember Lopez is sworn into office, she sends out mailers soliciting contributions to retire her campaign debt. Richard is the owner of a company that qualifies as an organization lobbyist. He sends a personal check for $150 to Councilmember Lopez. Even though the Councilmember is now an officeholder, she is also still a "candidate," and Richard's company must disclose the $150 contribution on its next quarterly disclosure report.

SCHEDULE C: CAMPAIGN DISCLOSURE – CITY CANDIDATES

Name of Organization: ____

Fill out a separate entry for EACH contribution of $100 or more made by an owner, officer, or lobbyist of the organization during the reporting period to a City candidate committee. (Do not use this schedule to report contributions made to a candidate-controlled ballot measure committee; use the schedule that follows for ballot measure contributions.)

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $___________________

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule D: Campaign Disclosures – Candidate Controlled Ballot Measure Committees

Complete and attach this schedule only if the organization or any of its owners, compensated officers, or lobbyists made contributions of $100 or more during the reporting period to a City ballot measure committee controlled by a City candidate. Note that elected City Officials (the Mayor, City Councilmembers, and the City Attorney) are considered "candidates" under campaign laws for as long as they remain in office, and are also "candidates" for purposes of this schedule. If no such contributions were made, check the applicable box on the cover sheet, and do not attach Schedule D.

Completing the form:

- Identify the organization's name at the top of each schedule.
- For each contribution of $100 or more made by the organization or by any of its owners, compensated officers, or lobbyists during the reporting period, state:
  - ✓ the name of the applicable owner, officer, or lobbyist;
  - ✓ the date of the contribution;
  - ✓ the amount of the contribution;
  - ✓ the name of the committee; and,
  - ✓ the name of the candidate controlling the committee.
- Attach as many continuation sheets as are necessary to report all such contributions made by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Oscar works as a lobbyist for a company that qualifies as an organization lobbyist. In August, he writes a personal check for $500 to support a City ballot measure opposing an increase in the City's transient occupancy tax. He gives the check to a ballot measure committee called "Citizens Against Higher Taxes." That committee is controlled by Sandra Smith, a City Councilmember. (Oscar knows that Sandra Smith controls the committee because the City's campaign laws require her name to appear on all of the committee's mass-distributed campaign literature, including its door hangers and mailers.) That same month, the company Oscar works for writes a check for $3,000 and gives it to "Citizens for a Better City," a committee that supports the same ballot measure, but which is not controlled by a candidate.

When the company prepares its July-September disclosure report, it must identify Oscar's $500 contribution, along with the date it was made, the amount, the name of the committee, and the name of the candidate who controlled the committee. The $3,000 contribution made by Oscar's company does not need to be disclosed because its contribution went to a committee that is not controlled by a candidate.

SCHEDULE D: CAMPAIGN DISCLOSURES – CANDIDATE CONTROLLED BALLOT MEASURE COMMITTEES

Name of Organization: ____

Fill out a separate entry for EACH contribution of $100 or more made by the organization or any of its owners, compensated officers, or lobbyists during the reporting period to a City ballot measure committee controlled by a City candidate or officeholder. (Do not use this schedule to report contributions made to support a candidate seeking elective office; use the preceding schedule for those types of contributions.)

Name of person making the contribution: ____________________________

Name of committee: ____________________________

Name of candidate controlling the committee: ____________________________

Date contribution made: ______________ Amount of contribution: $__________

Name of person making the contribution: ____________________________

Name of committee: ____________________________

Name of candidate controlling the committee: ____________________________

Date contribution made: ______________ Amount of contribution: $__________

Name of person making the contribution: ____________________________

Name of committee: ____________________________

Name of candidate controlling the committee: ____________________________

Date contribution made: ______________ Amount of contribution: $__________

Name of person making the contribution: ____________________________

Name of committee: ____________________________

Name of candidate controlling the committee: ____________________________

Date contribution made: ______________ Amount of contribution: $__________

Name of person making the contribution: ____________________________

Name of committee: ____________________________

Name of candidate controlling the committee: ____________________________

Date contribution made: ______________ Amount of contribution: $__________

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule E: Fundraising Activities

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists engaged in "fundraising activities" of $1,000 or more during the reporting period for a candidate for City office or for a ballot measure committee controlled by a candidate. If no such fundraising activity took place, check the applicable box on the cover sheet, and do not attach Schedule E.

"Fundraising activity" is defined in the Lobbying Ordinance to mean soliciting, or directing others to solicit, campaign contributions from one or more contributors, either personally or by hosting or sponsoring a fundraising event, and either: (1) personally delivering $1,000 or more in contributions to a candidate or a candidate's controlled committee, or (2) identifying oneself to a candidate or a candidate's controlled committee as having any degree of responsibility for $1,000 or more in contributions received as a result of that solicitation.

Completing the form:

- Identify the organization's name at the top of each schedule.
- If an owner, compensated officer, or lobbyist helped fundraise $1,000 or more for the same candidate during the reporting period:
  - ✓ fill out a separate entry for each instance in the period where that person engaged in fundraising activities.
  - ✓ disclose each of that person's fundraising efforts, even if a specific instance of fundraising didn't meet the $1,000 threshold or if different dates or events were involved. For example, report both an April fundraiser that raised $600 and a June fundraiser that raised $400 for the same candidate.
- For each instance of fundraising activity, state:
  - ✓ a brief description of the fundraising activity (e.g., "hosted a fundraiser" or "mailed solicitations to 20 business associates");
  - ✓ the name of the owner, compensated officer, or lobbyist who engaged in the fundraising activity;
  - ✓ the name of the candidate who benefited, or whose ballot measure committee benefited, from the fundraising activity;
  - ✓ a description of any applicable ballot measure;
  - ✓ the date(s) of the fundraising activity (e.g., the date a fundraiser was held, the week that contribution solicitations were mailed); and,
  - ✓ the total amount of contributions raised through the fundraising effort. Identify the total amount that an owner, compensated officer, or lobbyist helped raise, even if they were one of several persons involved in the effort. Do not reduce this amount on the basis of anyone's proportionate involvement.
- Attach as many continuation sheets as are necessary to report all such fundraising activities by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Mary owns a company that employs two lobbyists, John and Bill. Candidate Smith asks Mary, John, and Bill to help raise money for his City Council election campaign. Candidate Smith gives each of them a stack of remittance envelopes and asks them to distribute the envelopes to their friends and associates for contributions to his campaign.

- ➢ Mary hosts a fundraiser at her house, collects $5,500 in contribution checks, and delivers them to Candidate Smith.
- ➢ John writes his name on a corner of each envelope and mails them to a dozen of his associates, asking them to place a contribution in the envelope and send it to the candidate. John later finds out (through his associates or the candidate) that those associates contributed a total of $2,000 to Candidate Smith.
- ➢ Bill calls ten of his friends and encourages them to go to Mary's fundraiser. He takes no further action.

When the company prepares its quarterly disclosure report, it must identify Mary's and John's fundraising activities. Both solicited campaign contributions, and both made sure the candidate knew they were responsible for more than $1,000 in contributions. Bill's fundraising activities do not need to be disclosed – even though he solicited his friends on behalf of Candidate Smith, he never obtained any credit for contributions that might have resulted from his solicitations.

SCHEDULE E: FUNDRAISING ACTIVITIES

Name of Organization: ____

Fill out a separate entry for EACH instance in the reporting period where an owner, compensated officer, or lobbyist of the organization engaged in fundraising activities (if that individual has reached the $1,000 threshold):

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ______________________________

Description of ballot measure (if applicable): ______________________________

Date(s) of fundraising activity: ____

Approximate total amount raised (do not divide by number of persons involved): $____________

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ______________________________

Description of ballot measure (if applicable): ______________________________

Date(s) of fundraising activity: ____

Approximate total amount raised (do not divide by number of persons involved): $____________

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ______________________________

Description of ballot measure (if applicable): ______________________________

Date(s) of fundraising activity: ____

Approximate total amount raised (do not divide by number of persons involved): $____________

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule F: Campaign Services

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists provided compensated campaign services (e.g., consulting services) to a City candidate during the reporting period. Such services could be related to the candidate seeking office, or to a ballot measure committee controlled by the candidate. The services must be performed in exchange for a salary, bonus, or some other form of economic consideration. Do not disclose volunteer work performed for a candidate. If no compensated campaign services were rendered, check the applicable box on the cover sheet, and do not attach Schedule F.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Fill out a separate entry for each owner, compensated officer, and lobbyist in the organization who provided campaign services to a City candidate during the reporting period.
- If the services were provided to a candidate for elective City office, identify the name of the candidate and the office sought.
- If the services were provided to a candidate-controlled ballot measure committee, identify the name of the committee, the name of the candidate controlling the committee, and a brief description of the ballot measure (e.g., "increase transient occupancy taxes").
- Identify the approximate amount of compensation that the owner, compensated officer, or lobbyist earned for campaign services during the reporting period. If the individual has not yet been paid, but may be entitled to a contingency-based form of compensation (e.g., a "win bonus"), indicate "contingency" on the form.
- Provide a brief description of the services provided (e.g., "served as campaign consultant for Candidate A").
- Attach as many continuation sheets as are necessary to report all compensated campaign services provided by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Tim works as a lobbyist for a company that qualifies as an organization lobbyist. Outside the scope of that employment, Tim occasionally works as a campaign consultant. In November, he starts working on a campaign for a candidate seeking City office the following year. When his employer prepares its October-December disclosure report, it must identify Tim's campaign activities, including the name of the candidate and the office that candidate is seeking, the approximate amount of compensation he received from the candidate during the reporting period, and a description of the campaign services he provided to the candidate during the reporting period.

SCHEDULE F: CAMPAIGN SERVICES

Name of Organization: ____________________

Fill out a separate entry for EACH owner, compensated officer, or lobbyist of the organization who provided compensated campaign-related services to a candidate or a candidate-controlled committee (including a candidate-controlled ballot measure committee) during the reporting period.

Name of individual who provided campaign-related services: ____________________

If services were to a candidate for elective City office:

A. Name of candidate: ____________________

B. Office sought: ____________________

If services were to a ballot measure committee controlled by a candidate:

A. Name of committee: ____________________

B. Name of candidate controlling committee: ____________________

C. Description of ballot measure: ____________________

Approximate compensation earned for campaign-related services in the reporting period: $ ____________________

Description of campaign-related services provided in the period: ____________________

____

Name of individual who provided campaign-related services: ____________________

If services were to a candidate for elective City office:

A. Name of candidate: ____________________

B. Office sought: ____________________

If services were to a ballot measure committee controlled by a candidate:

A. Name of committee: ____________________

B. Name of candidate controlling committee: ____________________

C. Description of ballot measure: ____________________

Approximate compensation earned for campaign-related services in the reporting period: $ ____________________

Description of campaign-related services provided in the period: ____________________

____

☐ If more space is needed, check box and attach continuation sheet(s).

Instructions for Schedule G: City Contract Services

Complete and attach this schedule <u>only</u> if one or more of the organization's owners, compensated officers, or lobbyists provided compensated services during the reporting period under a City contract either as an employee, consultant, or independent contractor. If, for example, one of the organization's lobbyists was hired by the Mayor's office to provide consulting services in connection with outsourcing a City function, then the organization must report this relationship with the Mayor. If no compensated services were rendered, check the applicable box on the cover sheet, and do not attach Schedule G.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Fill out a separate entry for each owner, compensated officer, and lobbyist in the organization who personally provided compensated services under a contract with the City during the reporting period. Note that "City" includes all of the City's departments, agencies (such as CCDC and the Housing Commission), boards, and commissions.
- Identify the name of the person in the organization who provided the services.
- Identify the name of the applicable City department, agency, or board.
- State the approximate amount of compensation that person earned during the reporting period (regardless of whether the compensation was actually received).
- Provide a brief description of the services that were rendered (e.g., "consulting services pertaining to possible outsourcing computer services").
- Attach as many continuation sheets as are necessary to report all compensated services provided by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Malcom is a lobbyist who works for a non-profit environmental advocacy organization. Because of his expertise, the City's Environmental Services Department retains him as a consultant to evaluate the impact of a proposed hazardous waste program. Malcom starts and completes the contract in March. He submits a bill for $2,500 and he's paid in April. When his employer prepares its January-March quarterly disclosure report, it must report that (1) Malcom provided services to the City; (2) the services were provided to the Environmental Services Department; (3) Malcom earned $2,500 for the services he provided; and (4) Malcom's work involved evaluating the environmental impact of a proposed hazardous waste program.

✓ Note: when the organization prepares its April-June quarterly disclosure report, it need not disclose the consulting contract even though the payment was received in April (because the payment was "earned" in the prior quarter).

✓ Note: for purposes of this example, it is not relevant whether Malcom's contract with the City was made with the non-profit organization or with Malcom personally. In either case, Malcom's services to the City need to be disclosed.

SCHEDULE G: CITY CONTRACT SERVICES

Name of Organization: ____

Fill out a separate entry for EACH owner, compensated officer, or lobbyist of the organization who provided compensated services under a contract with the City of San Diego during the reporting period.

Name of individual who provided contract services: ______________________________

Name of department, agency, or board for which the services were provided: ________________

Approximate amount of compensation earned during the reporting period: $________________

Description of services provided: ______________________________________

Name of individual who provided contract services: ______________________________

Name of department, agency, or board for which the services were provided: ________________

Approximate amount of compensation earned during the reporting period: $________________

Description of services provided: ______________________________________

Name of individual who provided contract services: ______________________________

Name of department, agency, or board for which the services were provided: ________________

Approximate amount of compensation earned during the reporting period: $________________

Description of services provided: ______________________________________

Name of individual who provided contract services: ______________________________

Name of department, agency, or board for which the services were provided: ________________

Approximate amount of compensation earned during the reporting period: $________________

Description of services provided: ______________________________________

Name of individual who provided contract services: ______________________________

Name of department, agency, or board for which the services were provided: ________________

Approximate amount of compensation earned during the reporting period: $________________

Description of services provided: ______________________________________

☐ If more space is needed, check box and attach continuation sheet(s).